INTERNATIONAL STANDARD

ISO
20252

First edition
2006-04-01

Market, opinion and social research — Vocabulary and service requirements

Études sociale, d'opinion et de marché — Termes, définitions et exigences de service

PDF disclaimer

This PDF file may contain embedded typefaces. In accordance with Adobe's licensing policy, this file may be printed or viewed but shall not be edited unless the typefaces which are embedded are licensed to and installed on the computer performing the editing. In downloading this file, parties accept therein the responsibility of not infringing Adobe's licensing policy. The ISO Central Secretariat accepts no liability in this area.

Adobe is a trademark of Adobe Systems Incorporated.

Details of the software products used to create this PDF file can be found in the General Info relative to the file; the PDF-creation parameters were optimized for printing. Every care has been taken to ensure that the file is suitable for use by ISO member bodies. In the unlikely event that a problem relating to it is found, please inform the Central Secretariat at the address given below.

iTeh STANDARD PREVIEW
(standards.iteh.ai)

ISO 20252:2006
https://standards.iteh.ai/catalog/standards/sist/6dda69db-dce0-4076-93b5-
f649ffe57d72/iso-20252-2006

Contents

Page

Foreword

ISO (the International Organization for Standardization) is a worldwide federation of national standards bodies (ISO member bodies). The work of preparing International Standards is normally carried out through ISO technical committees. Each member body interested in a subject for which a technical committee has been established has the right to be represented on that committee. International organizations, governmental and non-governmental, in liaison with ISO, also take part in the work. ISO collaborates closely with the International Electrotechnical Commission (IEC) on all matters of electrotechnical standardization.

International Standards are drafted in accordance with the rules given in the ISO/IEC Directives, Part 2.

The main task of technical committees is to prepare International Standards. Draft International Standards adopted by the technical committees are circulated to the member bodies for voting. Publication as an International Standard requires approval by at least 75 % of the member bodies casting a vote.

Attention is drawn to the possibility that some of the elements of this document may be the subject of patent rights. ISO shall not be held responsible for identifying any or all such patent rights.

ISO 20252 was prepared by Technical Committee ISO/TC 225, *Market, opinion and social research*.

iTeh STANDARD PREVIEW
(standards.iteh.ai)

ISO 20252:2006
https://standards.iteh.ai/catalog/standards/sist/6dda69db-dce0-4076-93b5-
f649ffe57d72/iso-20252-2006

Introduction

The principal objective of international standardization is to facilitate business development and growth particularly between different national and regional markets. The intention is to apply the principles of international quality standards to market, opinion and social research and to harmonize other national standards already available.

Market, opinion and social research is now a global industry. An increasing proportion of the expenditure of users of the industry is allocated to multi-national projects whose objective is consistent regional and global measurement. An international quality standard directly facilitates the achievement of this important economic and social objective by ensuring that the process elements of such research are undertaken to an appropriate standard and in a verifiable and consistent manner. This will enable data, arising from research studies carried out according to this standard, being used to guide the provision of goods and services to citizens and institutions in a consistent and transparent fashion.

Subsidiary objectives in developing this International Standard have included the need to define the level of requirement for service provision and common work procedures to be applied in processes, including across different countries. To meet the expressed wishes of service providers and clients, this International Standard also clarifies the difference between market, opinion and social research and other activities such as direct marketing. This International Standard also embodies some essential principles of international standardization including openness and transparency, consensus of interested parties and technical coherence.

This first document produced by TC 225 contains extensive terms and definitions.

iTeh STANDARD PREVIEW
(standards.iteh.ai)

Market, opinion and social research — Vocabulary and service requirements

1 Scope

This International Standard establishes the terms and definitions as well as the service requirements for organizations and professionals conducting market, opinion and social research.

2 Terms and definitions

For the purposes of this document, the following terms and definitions apply.

2.1
access panel
sample database of potential respondents who declare that they will cooperate for future data collection if selected

NOTE   Continuously reporting panels, e.g. TV-rating-panels, consumer-panels, are not covered (see 2.37).

2.2
accuracy
degree of closeness between the estimate and the true parameter value

2.3
ad hoc
⟨research⟩ specifically designed to address a particular objective or issue

2.4
appraisal
process of monitoring the competency of an individual or group of individuals in carrying out their work

2.5
audit
systematic, independent and documented process for obtaining audit evidence and evaluating it objectively to determine the extent to which audit criteria are fulfilled

2.5.1
audit criteria
set of policies, procedures or requirements used as a reference

2.6
auditor
person with the competence to conduct an audit

2.7
bias
systematic deviation between the estimate and the true parameter value

2.8
client
individual, organization, department or division, internal or external, which requests or commissions a research project

2.9
code
numeric or alpha character or combination of characters associated with each response category

2.10
code frame
list of categories with associated codes (see 2.9) for classifying responses

2.11
computer-assisted interviewing
CAI
interviews with responses keyed directly into a computer and where the administration of the interview is managed by a specifically designed programme

NOTE   Examples include computer-assisted personal interviewing (CAPI), computer-assisted telephone interviewing (CATI), computer-assisted self-interviewing (CASI) and computer-assisted interviewing via Internet (CAWI).

2.12
confidentiality
requirement that data collected or information and materials are protected from unauthorized access

2.13
continuous research
research that involves regular and on-going data collection

2.14
data editing
data cleaning
set of methods verifying the collected data and, if necessary, correcting them

2.15
data entry
process step where data collected are converted into computer-readable form

2.16
data processing
DP
management and converting of data from its raw state through to a required output

2.17
data record
set of data derived from a reporting or observed unit

2.18
database
centrally held collection of data that is accessible to users

2.19
depth interview
unstructured interview conducted by a specially skilled interviewer

NOTE   The purpose of depth interviews is to understand the underlying motivations, beliefs, attitudes and feelings on a particular subject. Discussion can vary from interview to interview as long as all topics in a pre-defined discussion guide are covered.

2.20
desk research
secondary research
systematic examination and application of available secondary data in the context of a research objective

2.21
derived data item
data item used in analysis and/or tables derived from one or more source data items and/or categories

2.22
discussion guide
list of points or subjects which have to be covered in a depth interview or focus group

2.23
fieldworker
person involved in the collection of data for market, opinion and social research, excluding management

NOTE   Fieldworkers include (but are not limited to) face-to-face and phone interviewers, recruiters for qualitative or other research, "mystery shoppers" and others carrying out data collection by observation and "auditors" collecting data from retail outlets.

2.24
filter
question or instruction in a questionnaire that restricts answers to a subgroup of respondents

2.25
focus group
group discussion
informal discussion with a small number of selected participants conducted by a skilled moderator

2.26
frequency count
hole count
marginals
summary count of individual data items on the computer file

2.27
imputation
procedure where missing data are replaced by estimated or modelled data

2.28
incentive
gift, payment or other concessions offered to potential respondents to increase response rates

2.29
indexing
numerical scale used to compare variables with one another or with some reference number

2.30
logic data entry
data entry processes which are programmed to check question skips and response ranges

2.31
moderator
individual responsible for facilitating the interaction of the members of the focus group

2.32
mystery shopping
study using fieldworkers in the role of customers/users in order to evaluate a business/service performance

2.33
netting
method of treating codes assigned to multiple-response questions, which may include open-ended codes, where the net refers to the total number of people responding with the same group of codes, even when each person has given more than one response within the same group of codes

2.34
non response
failure to obtain measurements on some sample/census members for all or some questions or variables

2.35
observational research
research study where data are collected by directly or indirectly observing behaviour or events taking place

2.36
open-ended question
open-ended response
type of question where respondents are asked to answer in their own words

2.37
panel
group of selected research participants who have agreed to provide information at specified intervals over an extended period of time

NOTE   Panel does not cover access panel (see 2.1).

2.38
pre-testing questionnaires
small scale tests to check the performance of the questionnaire before embarking on full scale fieldwork

2.39
primary records
raw data including unedited completed questionnaires, recordings of qualitative research and other similar items

NOTE   This can be paper based or electronic based.

2.40
probability sampling
random sampling
procedure such that each member of the sampling frame has a specific positive chance of being included in the sample

NOTE   For probability sampling, statistical margins of error apply.

2.41
qualitative research
analysis of motivations, patterns of thought, opinion, attitude, assessment or behaviour via unstructured research techniques such as focus groups and depth interviews

NOTE   A statement about the frequency and distribution of such patterns within a given population is not possible on the basis of qualitative study.

2.42
quality management
procedures and measures focused on fulfilling quality control and quality assurance requirements

2.43
quantitative research
numerical representation of observations for the purpose of describing and explaining the phenomena that those observations reflect

NOTE   Often this research aims at making inference to populations. In most cases a structured questionnaire is used with predetermined questions with most of the responses being precoded.

2.44
questionnaire
structured tool for collecting data consisting of a series of questions

NOTE   Questionnaires can be self-completion or administered by an interviewer.

2.45
quota sampling
method of constructing a sample so that it conforms to a predefined structure with respect to certain variables

2.46
recruiter
person who identifies and invites respondents to participate in a research project

2.47
representativeness
extent to which a sample represents the defined target population

2.48
research proposal
written submission to a client which includes a research design

2.49
research service provider
service providers which conduct research projects or parts of research projects in market, opinion and social research, according to scientific principles and methods

NOTE   In particular, these can be private research institutions, academic and university research institutions, in-company research departments, local authorities, official statistics agencies or individual researchers acting in the same capacity.

2.50
respondent
person from whom data are collected

NOTE   Person includes natural or legal persons.

2.51
retail audit
collection of data from retail outlets using documentary and/or observational methods

2.52
sample
subset of the target population from which data are to be collected

2.53
sampling frame
list of population elements or other appropriate sources from which sample members are selected

2.54
sample variation
range of an estimate based on the sample size and sampling methods

2.55
screening
initial questions in a questionnaire used to establish eligibility of respondent

2.56
secondary data
data that have already been collected and are available from another source

2.57
simple data entry
data entry containing no built-in logic checks

2.58
subcontracting
outsourcing
passing responsibility for executing an element of the research project to a third party organization or individual

NOTE   Self-employed fieldworkers are not defined as subcontractors for the purposes of this standard.

2.59
survey
systematic data collection from a sample of a target population, to which inference can be made

2.60
target population
population of interest to which inferences are to be made

2.61
validation of data collection
procedures to check that data have been collected according to specification

2.62
validity
extent to which the results of a research process represent what was intended

2.63
verification of data
procedures to check that data are processed according to specification

2.64
wave
each successive repetition in a continuous project in which neither the objective nor the general project design change

2.65
weighting
calculation process in which different units or subgroups are recalculated by assigning numerical values as necessary to correct and/or improve the representativeness of the sample estimates

NOTE   Weighting can be used to adjust for unequal selection probabilities such as multistage sampling, coverage bias, non-response bias, etc.

3 Quality management system requirements

3.1 Organization and responsibilities

The research service provider shall apply a quality management system, which covers all the requirements of this International Standard.

Senior management of the research service provider shall:

— be committed to quality of client service (this may include a statement of quality policy and quality objectives);

— be responsible for the development, implementation and continual improvement of the quality management system;

— ensure that the quality management system is properly documented;

— ensure the provision of adequate resources and information for the system;

— appoint a quality manager with enough authority to be responsible for the whole system and who has the responsibility of organizing internal audits in order to make sure the present International Standard is applied.

The structure of the research service provider, including the responsibilities of the people involved in the realization and the control of the service, shall be documented.

Procedures, instructions and methods required for completing the different tasks in accordance with the requirements of this International Standard shall be documented, implemented, maintained and auditable.

The management of the research service provider shall ensure that everyone involved in the provision of the research service is familiar with the applicable national and international ethical and professional codes, relevant legislation and documented procedures and methods which specifically affect their work.

3.2 Confidentiality of research

All information supplied to the research service provider by the client in order to conduct a research project shall be treated in the strictest confidence. It shall only be used in this context and shall not be made available to third parties without the client's authorization. Confidential information shall be stored securely (see also 4.9.3).

The research results relating to a specific client, obtained by a research service provider as a result of carrying out a particular research project, shall not be used in research projects for other clients without authorization.

3.3 Documentation requirements

Records and documents (which may be paper based and/or electronic) shall be established and maintained to provide evidence of traceability.

Each project shall have a project file that contains or references the location of a documented project specification showing the basic requirements of the project.

In addition to unique project identification, every primary record shall be uniquely identified to allow traceability and to ensure they can be located.

Records shall be kept safe, useable and retained for defined periods (e.g. by computer file back-up).

All documents shall be subject to version control so that the valid version can be clearly identified.

All electronic files shall be checked for viruses by up-to-date virus detection software.